

# Chinook Decision Maker User Manual

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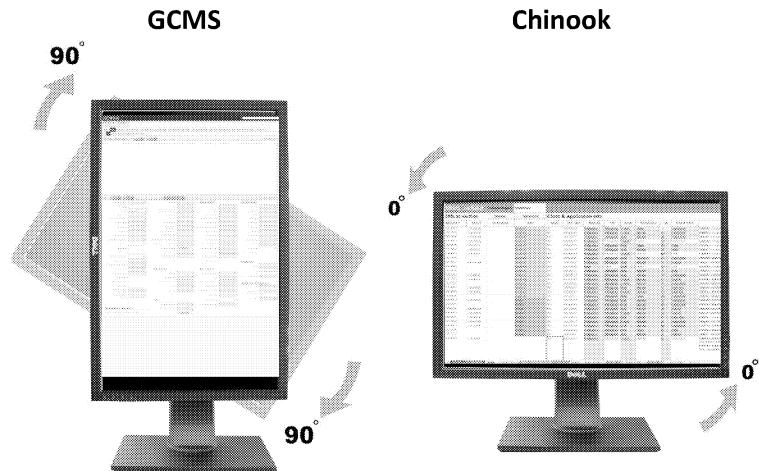
## What is the Decision Maker Module?

The Decision Maker Module is a tool that aims to increase the quantity of decisions that an officer can make on any given day as well as improve the quality of those decisions. Increased efficiency is gained by bringing a range of pertinent information required for making decisions together in one place where it can be reviewed easily and effectively. The DMM is organized in such a way that efficiencies of scale can be produced by processing like cases together and facilitating grouping in the finalization process.

## Using the Decision Maker Module

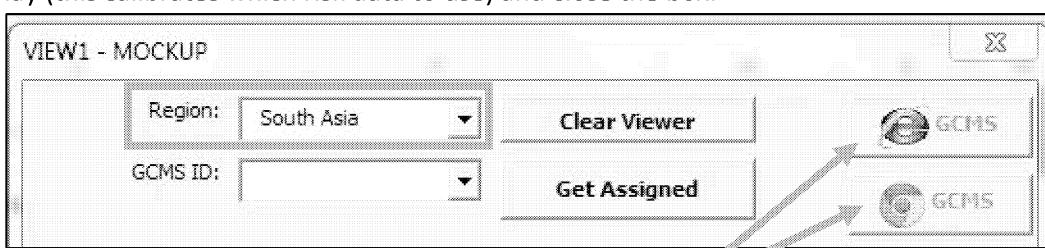
### Setting up Your Workstation

For best results we suggest you organize workstation so that you have one monitor in a landscape orientation (to be used with Chinook) and your other in Portrait (to be used for GCMS).



### Setting up Chinook

1. When you first open Chinook, you will see the following pop up box. Select your region from the display (this calibrates which risk data to use) and close the box.



Note you also have two direct links to the non-signet GCMS.

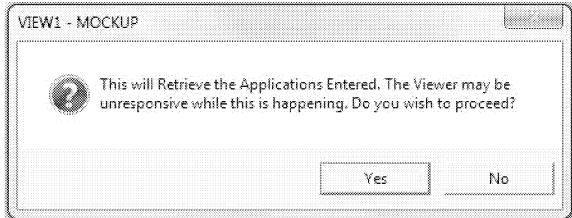
2. Welcome to the Decision Maker! First thing is to add the files that you will be working on. Select any empty cell in the “Application #” column and either scan or paste in your file number.

VIEW1 - MOCKUP		Selected Region:	South Asia
Officer Section		Display	Action List
Application #	Group #	Working Note	Action

You can also add in multiple applications at one time (up to 1000!) that are already in a column.

3. Click “Yes” to proceed!

(Can we remove this prompt?)



## Reviewing the Information

Chinook will display a series of info related to your files to help you in your decision making.

VIEWER MOCKUP		Selected Region	South Asia				
Officer Section		Display	Action List				
Application #	Group #	Working Note	Action	Rec'd Date	Gender	Age	Purpose of Visit
				6/15/2015	Male	48	Tourism
				6/29/2015	Male	44	Other
				7/2/2015	Male	33	Tourism
				5/3/2016	Male	74	Family Visit
				5/3/2016	Female	69	Family Visit
				6/21/2016	Male	70	Family Visit
				8/24/2016	Female	59	Super Visa
				7/20/2016	Male	66	Tourism
				10/11/2016	Female	46	Family Visit
				10/11/2016	Male	14	Family Visit
				10/11/2016	Male	12	Family Visit
				10/19/2016	Female	23	Other
				11/10/2016	Male	70	Super Visa

Use the scrollbar in the bottom right corner of the workbook to see more info.



All the info under the **Client & Application Info** section is presented just as the client has declared in their application form. Note that for the **Activity & Employer/School/facility** column, the default will display their most recently stated occupation/activity.

Purpose of Visit	Activity & Employer/School/Facility
Tourism	1958/06 to 1962/04 - Student / Étudiant @ [REDACTED] Philippines (Manila)
Family Visit	2007/01 to 2012/01 - Real Estate Agent @ [REDACTED] - Bacoor Cavite (Philippines)
Other	2000/04 to 2010/03 - Small business owner/store @ [REDACTED] - Philippines (Naguillian, La Union)
Other	1974/12 to 1998/12 - Police Officer @ [REDACTED] - Philippines (Naguillian, La Union)
Family Visit	2010/06 to Unspecified - Student @ [REDACTED] - Philippines (Paranaque City)

To view all of their declared employment/education history simply click anywhere in that cell.

Purpose of Visit	Activity & Employer/School/Facility
Tourism	1958/06 to 1962/04 - Student / Étudiant @ [REDACTED] - Philippines (Manila)
Family Visit	2007/01 to 2012/01 - Real Estate Agent @ [REDACTED] - Bacoor Cavite (Philippines)
	2006/05 to 2012/05 - Real Estate Agent @ [REDACTED] - Bacoor City, Cavite (Philippines)
	2005/05 to 2006/10 - Real Estate Agent @ [REDACTED] - Bacoor City, Cavite (Philippines)
	2000/03 to 2005/04 - Sewer/Alteration @ [REDACTED] - Bacoor City, Cavite (Philippines)
	1997/04 to 2000/04 - Student / Étudiant @ [REDACTED] - Banawe, Quezon City (Philippines)
	1995/04 to 2001/10 - Supervisor @ [REDACTED] - Quezon City (Philippines)
	1995/04 to 2001/10 - Supervisor @ [REDACTED] - Quezon City (Philippines)
	1995/03 to 2000/02 - Sewer Supervisor @ [REDACTED] - Banawe Quezon City (Philippines)
Other	2000/04 to 2010/03 - Small business owner/store @ [REDACTED] - Philippines (Naguillian, La Union)
Other	1974/12 to 1998/12 - Police Officer @ [REDACTED] - Philippines (Naguillian, La Union)

The StatQs (positive answer) column will display if any Statutory questions have been answered with a “yes” as well as any details provided. If all questions have been answered “no” then the column will contain “StatQ(N) – Unspecified” in grey.

StatQs (positive answer)
StatQ(N) -Unspecified
StatQ(N) -4a: 1993/12/01 to present. PHILIPPINE NATIONAL POLICE. PHILIPPINES
StatQ(N) -Unspecified
StatQ(N) -4a: Philippine National Police from June 1969 to December 1997
StatQ(N) -Unspecified
StatQ(N) -Unspecified

The Previous GCMS History column

GCMS Info	
Previous GCMS History	

NOTE: this feature is not meant to replace the integrated search as it is only an exact UCI match, not including households.

HOT TIP: As Chinook is an Excel based tool, you can use hot-keys in Excel to speed up your navigation. For example, hit the “Home/Debut” on your keyboard to jump from anywhere on the viewer back to Column F. So, if you are looking at the Risk Data to the far right of the sheet and want to jump back quickly, hit Home.

### Risk Section Data explanation

Chinook checks the 6 filter profile of your applicant and will provide data if the profile had at least 50 applications finalized within the last 12 months. If less than 50 applications were received, Chinook will then drop to 3 filters and run the same check. If less than 50 applications were finalized for the 3 filter profile, the data is considered insufficient and will not provide any data to the officer.



To ensure datasets have a valid sample size, some filters had to be placed into ranges or buckets which are explained below:

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## Risk Section Display

Risk data currently includes the following (all are limited to the last 12 months and data is currently updated one time per month):

- **Filters Used:** This indicates where 6 or 3 filters were used to populate the percentages in the Local and Global rates. Note that if 6 filters is used for local, it is automatically also used for global. If 3 filters are used for local, it is automatically used for global.

## Customizing How Your Files Are Displayed

There are a number of ways you can use the Decision Maker tool to help you organize your files as well as customize which data you decide to look at.

## Sorting & Filtering

You can sort & filter any column to arrange the order that your files are displayed in. To do this, simply click on any of these boxes and choose your action.

Rec'd Date	Citizenship	CoR	Gender	Marital Status	Age	Purpose of Visit
7/2/2015	<u>Pakistan</u>	Japan	<u>Male</u>	Single	<u>33</u>	Tourism
6/21/2016	<u>Philippines</u>	<u>Philippines</u>	<u>Male</u>	<u>Widowed</u>	70	<u>Family Visit</u>
8/24/2016	<u>Philippines</u>	<u>Philippines</u>	<u>Female</u>	<u>Widowed</u>	<u>59</u>	<u>Super Visa</u>
7/20/2016	<u>Philippines</u>	<u>Philippines</u>	<u>Male</u>	<u>Married</u>	66	<u>Tourism</u>
10/11/2016	<u>Japan</u>	Japan	<u>Female</u>	Legally Separated	<u>46</u>	Family Visit

When the option box opens, you will be presented with a number of options for sorting and filtering. You can decide to display only applications from a specific nationality (filtering under citizenship) or organize your files to display all those with previous CAN approvals at the top (sorting by color under the previous GCMS history column).

\*Be careful when sorting and filtering that you don't accidentally split groups (by applying filters that do not apply to all members of that group).

The screenshot shows a Microsoft Access filter dialog box for the "Citizenship" field. The dialog has several tabs at the top: "Action", "Rec'd D", "Citizenship" (which is selected), and "CoR".

The "Citizenship" tab contains the following options:

- Sort A to Z (with up and down arrows)
- Sort Z to A (with up and down arrows)
- Sort by Color (with a color swatch icon)
- Clear Filter From "Citizenship" (with a trash can icon)
- Filter by Color (with a color swatch icon)
- Text Filters (with a magnifying glass icon)

Below these options is a "Search" input field with a magnifying glass icon.

The main area displays a list of citizenship values with checkboxes:

- (Select All)
- Afghanistan
- Brazil
- Burma (Myanmar)
- China** (highlighted with a red border)
- Guinea
- India
- Iran
- Jamaica
- Japan

At the bottom of the dialog are "OK" and "Cancel" buttons.

You can do multilayered sorts to combined different elements. Click the down arrow and select "Sort by Color" (even if you have no colors) and then click "custom sort". You can now run a multilayered sort first sorting by one column, and then another within that initial sort

Group #	Working Note	Eligibility	Action	Cat
UQ	A ↓ Sort A to Z			PG-1
UQ	Z ↓ Sort Z to A			V-1
UQ	Sort by Color		Custom Sort...	V-1
		Clear Filter From 'Eligibility'		

### Columns Display

You can control what data points are displayed in the Decision Maker module by clicking on the display button.

**VIEW1 - MOCKUP** Selected Region: South Asia

Officer Section		Display	Action List
Application #	Group #	Working Note	Action

Select or unselect those data that you wish to be displayed in the viewer.

Use the **Clear Filters and Sorting** button if you want to remove any filters that have been applied to your files.

**VIEW1 - MOCKUP**

Region: South Asia	Clear Viewer	
GCMS ID:	Get Assigned	
Officer Section Client & Application Info GCMS Info Risk Section		
<input checked="" type="checkbox"/> Pre-Assessment Notes <input checked="" type="checkbox"/> Category <input checked="" type="checkbox"/> Rec'd Date <input checked="" type="checkbox"/> Citizenship <input checked="" type="checkbox"/> CoR <input checked="" type="checkbox"/> Gender <input checked="" type="checkbox"/> Marital Status <input checked="" type="checkbox"/> Age <input checked="" type="checkbox"/> Purpose of Visit <input checked="" type="checkbox"/> Activity & Employer/School/Facility <input checked="" type="checkbox"/> Self Declared Travel <input checked="" type="checkbox"/> StatQs (positive answer)		
<b>Clear Filters and Sorting</b>		
Close		

# Organizing How You Action Your Files

As you go through your list of files and are deciding whether you will approve, refuse, withdraw or otherwise action the files you will have the **Action** column to assist you. The Action column gives you a place to indicate what action is to be taken for each file. Using the action column allows you to focus on your file review and action your files in groups once you have looked at them all, leveraging efficiency through economies of scale.

VIEW1 - MOCKUP		Selected Region:	Middle East
Officer Section		Display	Action List
Application #	Group #	Working Note	Action
		Request Meds	Other
			Approval
			Approval
			Approval
			Refusal
			Refusal
			Approval
			Approval
			Approval
		Request PG-1	Other

## Using the Action Column

Review your file and the information provided in Chinook. When you've determined what action is needed, click on the box corresponding to your file in the action column.

You will be presented with the following options box:

Select your action.

**Refusal Reasons:** If you are refusing the application, click the boxes that correspond to your refusal reasons.

**Refusal Note Generator:** Some refusal reasons will require additional input for the refusal note to be accurately generated. If any of these boxes are no longer greyed out, type inside the box to complete the sentence as you wish it to appear in your refusal note.

**Working Note:** You can use this field to mark any particular or special action required by a file. For example if you have a file that requires meds you can select "Other" and indicate "Request Meds" in the working Note

Action -

<input type="radio"/> Approval	<input checked="" type="radio"/> Refusal	<input type="radio"/> Other	<input type="radio"/> Withdrawal
--------------------------------	--	-----------------------------	----------------------------------

Travel history (no proof of travel history)  
 Travel history (minimal or insufficient)  
 Proposed stay in Canada does not appear to be reasonable  
 Length of proposed stay in Canada does not appear to be reasonable

**Purpose of visit**

The purpose of the visit itself does not appear to be reasonable, in view of the fact that  
 Not satisfied that you have answered truthfully all questions

**Having a legitimate business purpose in Canada**

**History of contravening the conditions of admission on a previous stay in Canada**

**Length of proposed stay in Canada**

**Other reasons:**

**Working Note:**

**Save Action & Notes**

**Save Action & Notes:** Click here

box. When you return to the Viewer the working note will be displayed alongside the Action.

VIEW1 - MOCKUP		Selected Region	Middle East
Officer Section		Display	Action List
Application #	Group #	Working Note	Action
		Request Meds	Other
			Approval
		Single Entry	Approval
			Approval
			Approval
		Request PG-1	Other
			Refusal

**Applying action to multiple files:** If you wish to apply the same action to a number of files in a row, click in the first box, hold down and drag across all the file for which you want the action to apply. Select desired action and click “Save Action & Notes”.

VIEW 1 - MOCKUP		Selected Region:	Middle East
Officer Section		Display	Action List
Application #	Group #	Working Note	Action
			Approval

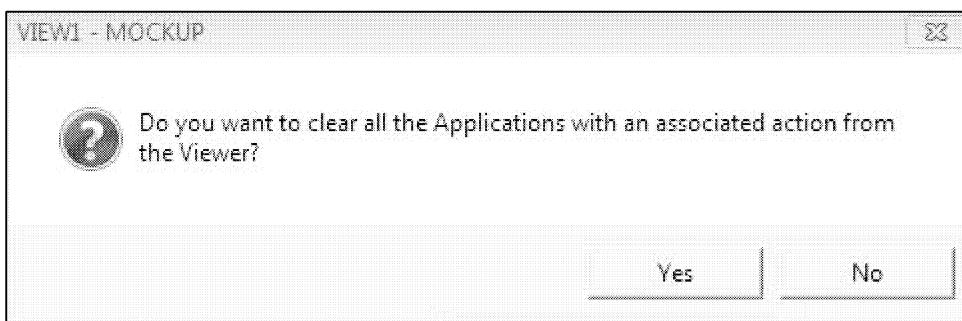
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## Grouping your files for action

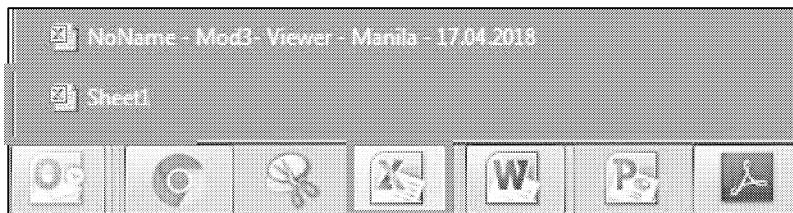
When you have completed the review of your files and are ready to action them you can click the **Action List** button. This will compile a series of file lists and query strings for you in order that your files may be actioned efficiently and in groups wherever possible. These lists will be determined based on each unique action that you have selected for each file. Any working notes that you have indicated will also be carried over to the lists to assist you.

Officer Section		Display	Action List
Application #	Group #	Working Note	Action
			Approval
			Approval
			Approval
	Single entry		Approval
	Single entry		Approval
			Refusal

After clicking the **Action list button**, you will be asked if you would like to have the files removed from the Decision Maker module. The lists for action will be created either way but you must decide if you want the file numbers to remain in the Decision Maker Module as well.



A separate workbook will be created with each list of unique actions. Click on



## Action lists

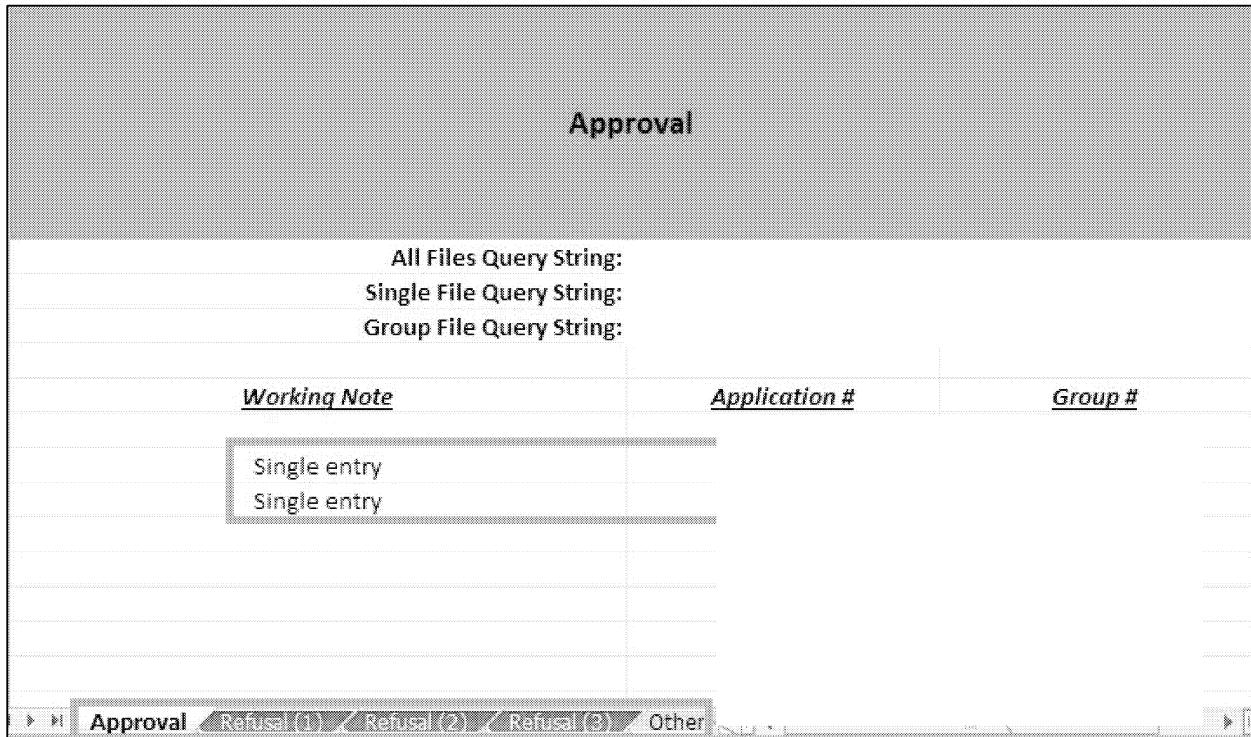
Your action lists will be in a separate excel document, applications will be grouped together according to the action that you have specified earlier in the Decision Maker module. For each action you will be provided with three file strings for querying in GCMS.

**All Files Query String:** includes all files designated for that action

**Single File Query String:** includes all files that are not presently in groups.

**Group File Query String:** String of all groups containing the files for action.

## The Approval List



<u>Working Note</u>	<u>Application #</u>	<u>Group #</u>
Single entry		
Single entry		

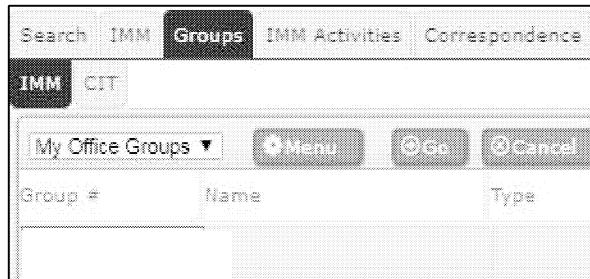
You can navigate between the different action lists using these tabs here.

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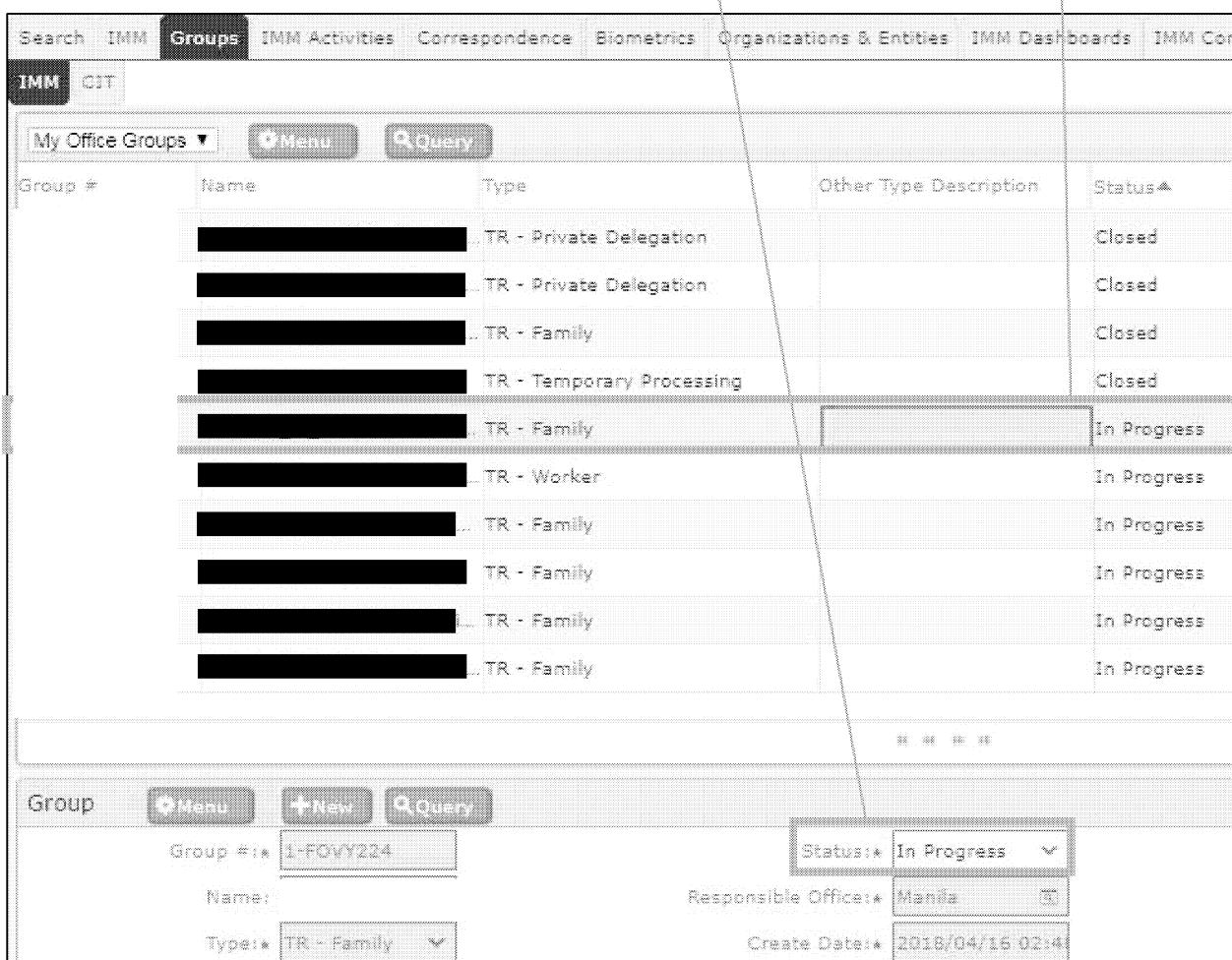
You will also see all the applications displayed in a column with any corresponding working notes that you have indicated in the Decision Maker module beside them.

**HOT TIP:** When approving files, close all the corresponding groups using the Group File Query String and then make one super group of all your approvals.

- 1) Copy the **Group File Query String**
- 2) In GCMS, navigate to Groups-IMM, click the IMM tab twice so that the screen looks like this
- 3) Paste your Group File query string and click "go".



- 4) You can now quickly close any groups that your files are in by selecting any with status "in Progress" and changing it to "closed" in the bottom tab.



Group #	Name	Type	Other Type Description	Status
[REDACTED]	[REDACTED]	TR - Private Delegation		Closed
[REDACTED]	[REDACTED]	TR - Private Delegation		Closed
[REDACTED]	[REDACTED]	TR - Family		Closed
[REDACTED]	[REDACTED]	TR - Temporary Processing		Closed
[REDACTED]	[REDACTED]	TR - Family		In Progress
[REDACTED]	[REDACTED]	TR - Worker		In Progress
[REDACTED]	[REDACTED]	TR - Family		In Progress
[REDACTED]	[REDACTED]	TR - Family		In Progress
[REDACTED]	[REDACTED]	TR - Family		In Progress
[REDACTED]	[REDACTED]	TR - Family		In Progress

Group	Create	New	Query
Group #: <input type="text" value="1-FOVY224"/>	Status: <input type="button" value="In Progress"/>	Name: <input type="text"/>	Responsible Office: <input type="button" value="Manila"/>
Type: <input type="button" value="TR - Family"/>	Create Date: <input type="text" value="2018/04/16 02:14"/>		

- 5) Once all groups are closed, you can use the **All Files Query String** to create a super group for all your approval files.

## Approval

All Files Query String  
Single File Query String  
Group File Query String

## The Refusal List(s)

## The Other Actions List

Other	
<u>Working Note</u>	<u>Application #</u>
Request Military Table	
Request updated Letter of Acceptance	

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## Give it a Try! Best Practices and Tips from the Experts

### Processing Paper Files in Chinook



# USER GUIDE - Module 1



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## INTRODUCTION

**Pages 21 to / à 38  
are withheld pursuant to section  
sont retenues en vertu de l'article**

**16(2)(c)**

**of the Access to Information Act  
de la Loi sur l'accès à l'information**

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**16(2)(c)**

**of the Access to Information Act**  
**de la Loi sur l'accès à l'information**

**Pages 23 to / à 42  
are withheld pursuant to section  
sont retenues en vertu de l'article**

**16(2)(c)**

**of the Access to Information Act  
de la Loi sur l'accès à l'information**

**Page 24**  
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**16(2)(c)**

**of the Access to Information Act**  
**de la Loi sur l'accès à l'information**

**Page 25**  
**is withheld pursuant to section**  
**est retenue en vertu de l'article**

**16(2)(c)**

**of the Access to Information Act**  
**de la Loi sur l'accès à l'information**



# **MODULE 3: Decision Maker Module**

# **USER MANUAL v.3**

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## Revision History

Draft Version	Description	Date	Author
Draft v0	Description and detailed instructions of how to use new Chinook + and GCMS Chinook Tab (Stage 2 of Rollout)	27FEB2020	Lisa Catana
v1	Amendments to Biometrics Logic	10MAR2020	
v2	Amendments to Logic Inclusion of SP/WP/EXT functionality	27APR2020	Lisa Catana
v3	Update to screenshots and functionality for Mod 3 – excludes Chinook+/Chinook Tab	16JUN2020	Lisa Catana

## Contact

For any questions and/or comments relating to Chinook please contact the Chinook mailbox at  
[IRCC.INChinook-ChinookRI.IRCC@cic.gc.ca](mailto:IRCC.INChinook-ChinookRI.IRCC@cic.gc.ca)

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## What is Module 3 - Decision Maker Module?

The Module 3 - Decision Maker Module is a tool that aims to increase the quantity of decisions that an officer can make on any given day as well as improve the quality of those decisions. Increased efficiency is gained by bringing a range of pertinent information required for making decisions together in one place where it can be reviewed easily and effectively. Module 3 is organized in such a way that efficiencies of scale can be produced by processing like cases together and facilitating grouping in the finalization process.

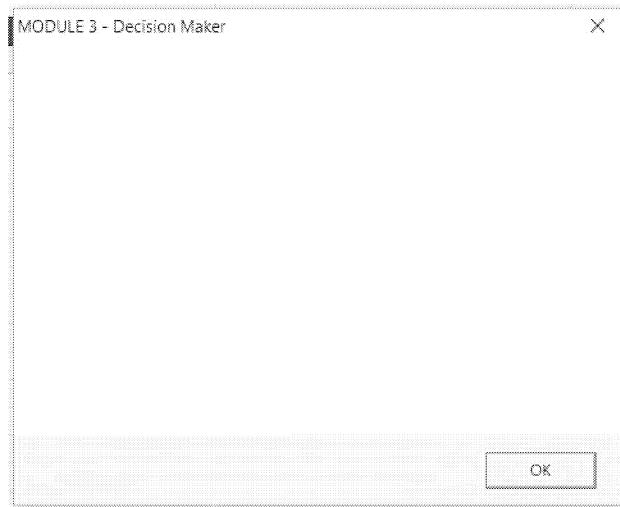
## Set up and get started

### Setting up your workstation

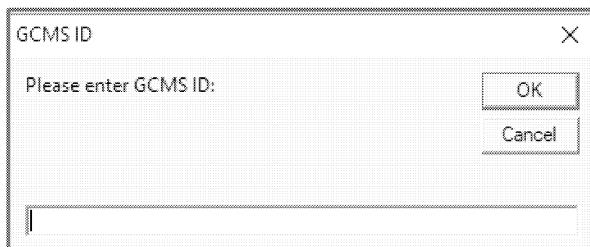
1. For best results, organize workstation so that you have one monitor in a landscape orientation (to be used with Chinook) and your other in Portrait (to be used for GCMS).

### Set-up for Chinook Module 3

2. Open *Chinook – Module 3 – Viewer.xlsb*
3. Read the Disclosure dialogue box and click **OK**

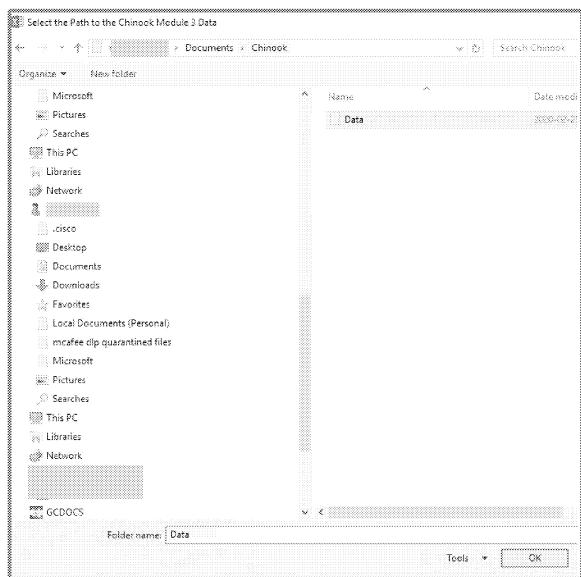


4. **Enter your GCMS ID:** When prompted, enter your GCMS ID



Data Path

5.



6.

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## Using the Settings button

7. Click on the *Settings* icon, on the left hand tools menu. 

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### 8. Basic Setup Tab :: User Info

9.

10.

## Using the Settings button (continued)

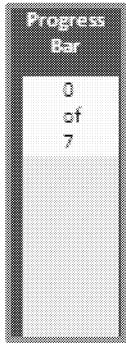
11. **Column Setup Tab:** Use the checkboxes to customize the Module 3 columns displayed. Unchecking a box will hide that column from view.

- Ex. If your office does not conduct pre-assessment, hide this field to save space on your screen.

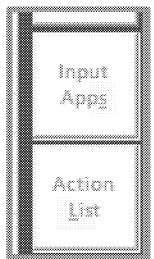
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## Progress Bar and Hot Keys

12. **Progress Bar:** On the left hand side of the Module 3 worksheet, there is a progress bar for users to easily see the number of applications entered into the tool, and how many have been actioned. The progress bar will update as you complete the Action column for any application.



13. **Navigation:** As Chinook is an Excel based tool, you can use hot-keys in Excel to facilitate navigation. The Chinook Decision Maker Module has various hotkeys built in to limit the user's need to use the mouse. Hotkeys options are indicated by underlining a letter on the button/action.



See below for some examples:

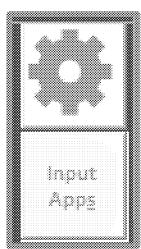
Hot Key	Function
Home/Debut	Will return your viewer back to Column F.
ALT+D	Open Display Popup
ALT+L	Launch Action List
ALT +S	Launch Input Apps Window

# Inputting & Reviewing Applications in Module 3

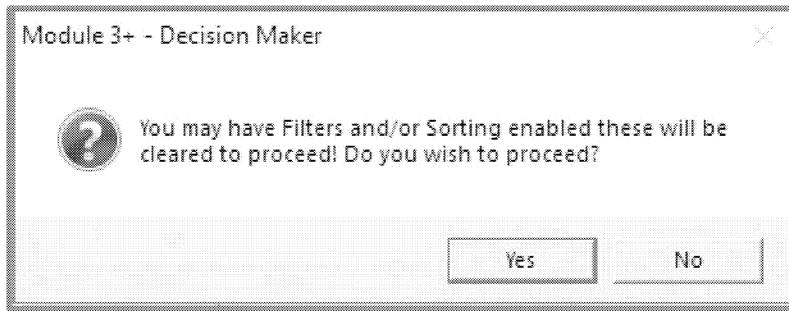
## Inputting Apps

### 1. Input Applications

- To input applications, click the *Input Apps* button on the left hand Tool Menu.

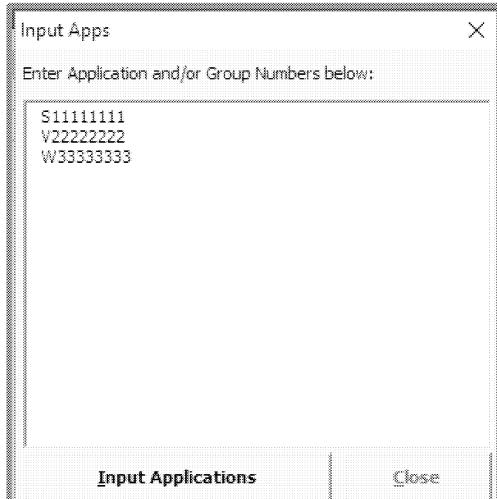


- A warning message will pop-up advising that any filters/sorting currently used on the Module 3 sheet will be cleared. Click **Yes** to proceed.



- Enter Application numbers and/or Group numbers in the Input Apps window when prompted. Click *Input Applications* when complete.

**NOTE:** If you enter both Group and Applications numbers, the group numbers will be pasted in first to the tool, then the application numbers.

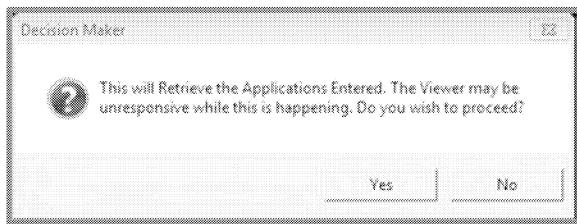


s.16(1)(b)

s.16(1)(c)

## Inputting Apps (continued)

- Once applications entered, the tool will advise that it is about to retrieve the data and may appear unresponsive. Click Yes and wait for the data to be populated for the applications entered.



- You can monitor the status of the data upload in the bottom left-hand corner of the Excel screen.



## Reviewing Applications

- Each row in Module 3 will display the relevant information for the application. Use the scrollbar in the bottom right corner of the workbook to see more info.

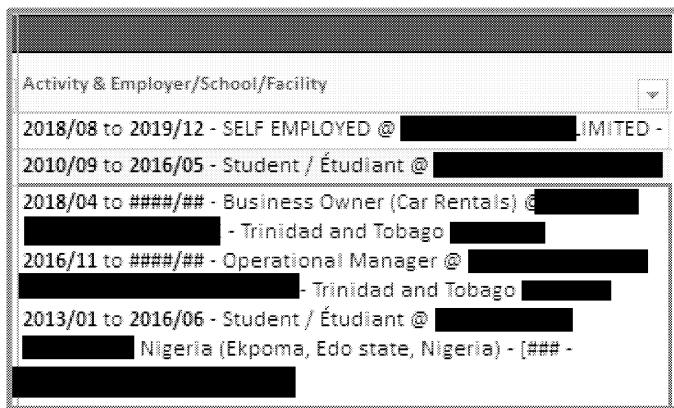
Age	Pu
33	
12	
75	
32	

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## Reviewing Applications (continued)

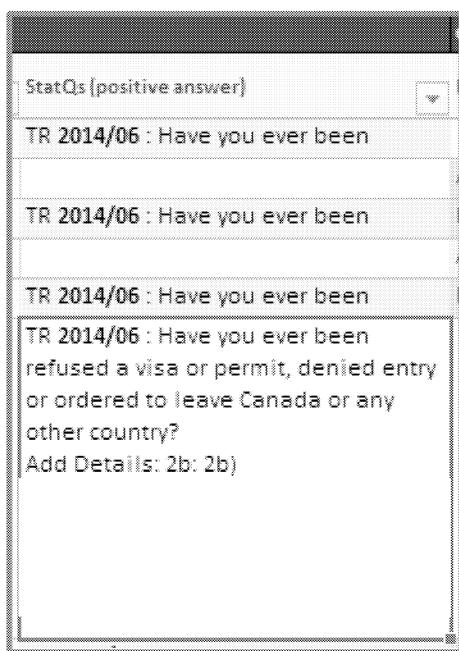
- **Client & Application Information:** All the info under the **Client & Application Info** section is presented just as the client has declared in their application forms.
- **Activity & Employer/School/Facility:** The default will display the client's stated activities in reverse chronological order. To view all declared employment/education history simply click anywhere in the cell to expand to full view.



The screenshot shows a table titled "Activity & Employer/School/Facility". It lists several entries in reverse chronological order:

Period	Role / Location
2018/08 to 2019/12	SELF EMPLOYED @ [REDACTED] LIMITED - [REDACTED]
2010/09 to 2016/05	Student / Étudiant @ [REDACTED]
2018/04 to #####/#	Business Owner (Car Rentals) @ [REDACTED] - Trinidad and Tobago [REDACTED]
2016/11 to #####/#	Operational Manager @ [REDACTED] - Trinidad and Tobago [REDACTED]
2013/01 to 2016/06	Student / Étudiant @ [REDACTED] Nigeria (Ekpmoma, Edo state, Nigeria) - [### - [REDACTED]]

- 



The screenshot shows a table titled "StatQs [positive answer]". It lists several questions and their corresponding answers:

Question	Answer
TR 2014/06 : Have you ever been	[REDACTED]
TR 2014/06 : Have you ever been	[REDACTED]
TR 2014/06 : Have you ever been	[REDACTED]
TR 2014/06 : Have you ever been refused a visa or permit, denied entry or ordered to leave Canada or any other country?	[REDACTED]
Add Details: 2b: 2b)	[REDACTED]

- **Previous GCMS History:**

## Reviewing Applications (continued)

### Sorting & Filtering

3. There are a number of ways use simple Excel functions to help organize the applications and the data in Module 3 using the Sort/Filter drop-down button on each column.

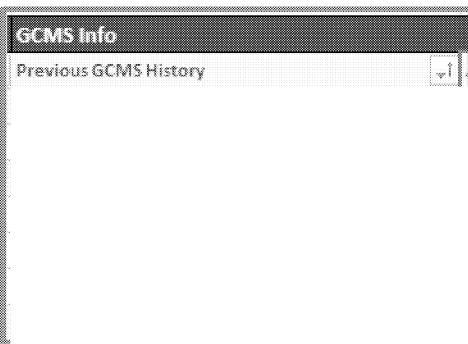
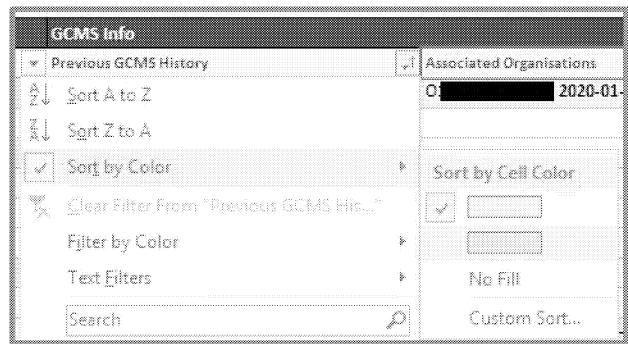
Citizenship	CoR	Gender	Marital Status	Age	Purpose of Visit

#### 4. Sorting:

- **Sort A to Z or Sort Z to A:** These will sort the list of data in alphabetical order or reverse alphabetical order.
-

s.16(1)(c)

## Sorting & Filtering (continued)

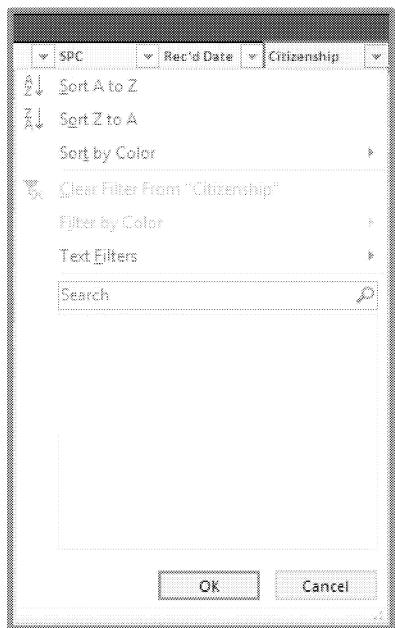


- Multilayered Sort:** To combine different elements, click the down arrow and select "Sort by Color" (even if there are no colors) and then click "Custom Sort". This will provide options to run a multilayered sort first sorting by one column, and then another within that initial sort.

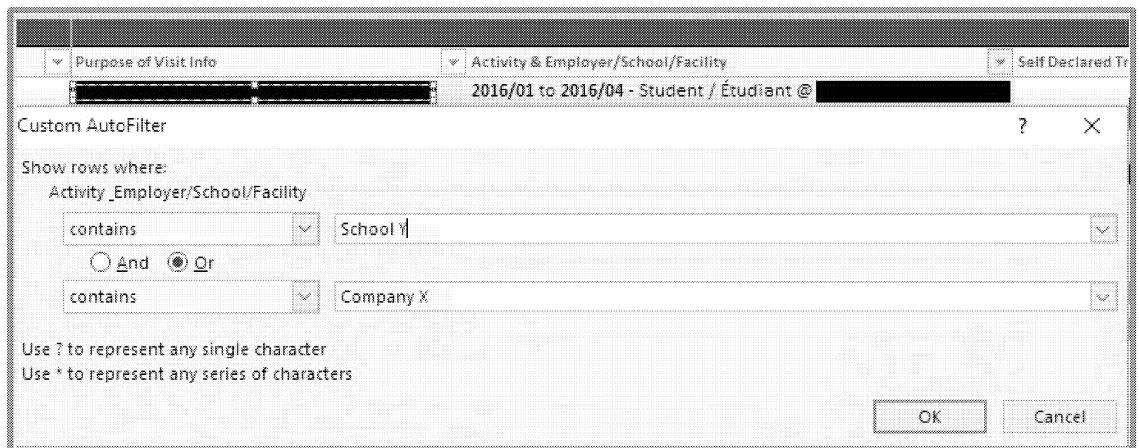
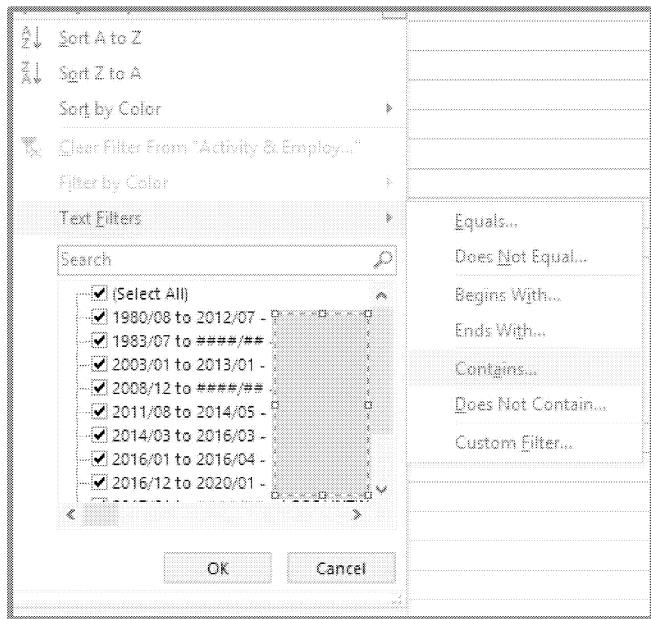
**NOTE:** Be careful when sorting and filtering that you don't accidentally split groups (by applying filters that do not apply to all members of that group).

### 5. Filtering:

- Filter checkboxes:** Use the checkboxes to filter your list. For example for the Citizenship column, you can restrict view to only applications of the same country.



## Sorting & Filtering Continued)



## Finalizing Applications in Chinook

### Using the Action Column

1. The Action column is where to indicate the intended action/decision to be taken for each application. Review the application and the information provided in Chinook. When you've determined what action is needed, click on *Action* column cell corresponding to the application.
2. **Hover over feature:** Hover over any cell in the Action column to quickly view the notes entered for an application.

---

3. **Working Note:** This field can be used as an electronic "post-it note" to mark any particular or special action required on an application. The working note DOES NOT get included as part of the note to be copied into the Notes tab. It is only for reference. For example, as you review the application and had concerns of the client's employment, you could enter a working note stating "review employment documents" as a reminder.
4. **To enter an action for a single application:** Highlight the Action cell corresponding to an application to launch the Action Window.
5. **To enter an action for a multiple applications:** In the Action column, highlight multiple cells for the corresponding applications to launch the Action Window then enter in the desired action and click Save Action & Notes.

## Using the Action Column (continued)

Alternatively, enter the action on a single application, then click hold down the Action cell and drag across all the application for which you want the action to apply.

Officer Section		
Application #	Group #	Action
S3	2-S	Approval
V3		
W3	2-S'	
W3		
V3		
V3		
V3		

Officer Section		
Application #	Group #	Action
S3	2-	Approval
V3		Approval
W	2-	Approval
W		Approval
V3		Approval
V3		Approval
V3		Approval

### 6. Approvals: You will be presented with the following Action Window.

- Click the *Approval* checkbox.
- Ensure the correct line of business is selected from the drop-down menu.
- Once your desired actions have been entered [click Save Action & Notes](#)

### 7. Refusals: You will be presented with the following Action Window.

- Click the *Refusal* checkbox.
- Ensure the correct line of business is selected from the drop-down menu.
- Edit Deactivated:** This button will activate the edit function for each refusal ground. Select it before you enter your refusal grounds, and it will allow you to edit each ground separately.
- Refusal Reasons:** Check the boxes that correspond to your refusal grounds.
- Refusal Note Generator:** For each refusal ground selected, a corresponding line will be added to the refusal note. For certain refusal grounds, multiple options will be available, and you will be prompted to amend the text to reflect your application.
- Once your desired actions have been entered [click Save Action & Notes](#)

## Using the Action Column (continued)

8. **Other:** You will be presented with the following Action Window.
  - Click the *Other* checkbox.
  - Ensure the correct line of business is selected from the drop-down menu.
  - Once your desired actions have been entered [click Save Action & Notes](#)

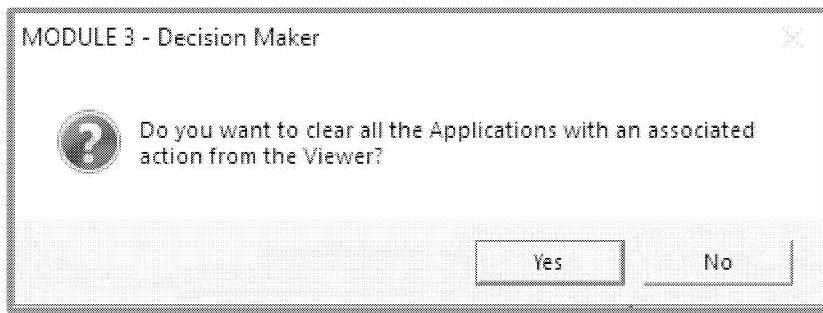
## Using the Action Column (continued)

9. **Withdrawal:** You will be presented with the following Action Window.
  - Click the *Other* checkbox.
  - Ensure the correct line of business is selected from the drop-down menu.
  - Once your desired actions have been entered *click Save Action & Notes*

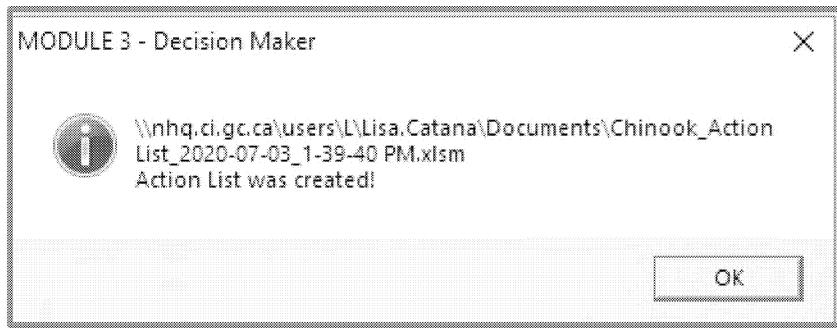
# Creating Action Lists

## Using the Action List Button

1. After completing review of applications and entering intended actions – click the **Action List** button. This will compile a series of application lists and query strings to facilitate batch processing in GCMS. Any working notes that you have indicated will also be carried over to the lists. A separate list will be created for each Action as follows:
  - Approvals
  - Withdrawals
  - Other (one list for each group of applications with the same action)
  - Refusals (one list for each group of applications with the same refusal grounds)
  - No Action: list of files where no action was indicated
2. After clicking the **Action list button**, a pop-up will appear to confirm if you would like to have the applications removed from the Decision Maker module.
  - Click **YES** to keep all applications listed in your Module 3 session
  - Click **NO** to remove the completed applications from your Module 3 session.



3. Once you have clicked either **YES** or **NO**, the following pop-up will appear to inform you that the actions lists have been created. Click **OK**



4. A new worksheet will automatically open for the action lists. Each tab of the worksheet will represent a different action:



**s.16(1)(b)**

**s.16(1)(c)**

**s.19(1)**

## Using Action Lists with GCMS

Action List  
Overview

1.

Approval or  
Withdrawal  
Action Lists

2.

3.

**s.16(1)(b)**

**s.16(1)(c)**

**Refusal Action Lists**

4.

5.

6.

7.

**Other Action Lists**

8.

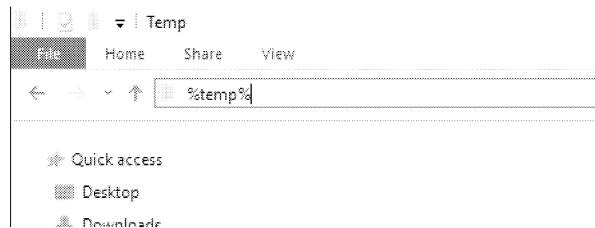
**Other  
Action Lists  
(continued)**

## Autosave Feature

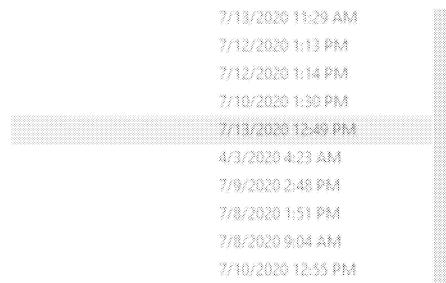
### Retrieving Autosaved Action List

Chinook Module 3 generates and saves automatically an Action List every 15 minutes in the user's temporary folder. This feature was developed to avoid losing all the work done in the event of an unexpected crash.

To retrieve the autosaved Action List, open your user temporary folder by typing %temp% in a "Windows Explorer" window and pressing "Enter":



Then look for the file "Chinook\_ActionList\_AutoSave.xlsm" and open it.



Once the file is opened, you will see the actions that you had already entered in the "Action" column at the time the last autosave was done. You can then use the file lists to enter your decisions in GCMS and to keep working in Module 3.

Note that this file is replaced every time it is saved, every 15 minutes. That means that if you want to keep a copy of the files as they were after a crash, you will need to save it in another location.

s.16(1)(b)

s.16(1)(c)

## Best Practices for Paper Applications

Processing  
Paper  
Application  
s in Chinook



# USER's GUIDE - Module 2

V14.1



Immigration, Refugees and Citizenship Canada

Immigration, Réfugiés et Citoyenneté Canada

1A-2022-79418-000051

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## INTRODUCTION

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TRV Journey Lab ::  
**Chinook+ & GCMS Chinook Tab**  
**USER MANUAL v.3**

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## Revisionist History

Draft Version	Description	Date	Author
Draft v0	Description and detailed instructions of how to use new Chinook + and GCMS Chinook Tab (Stage 2 of Rollout)	27FEB2020	Lisa Catana
v1	Amendments to Biometrics Logic	10MAR2020	
v2	Amendments to Logic Inclusion of SP/WP/EXT functionality	27APR2020	Lisa Catana
V3	Minor edits	18JAN2021	Zal Karkaria

## Contact

For any questions and/or comments relating to Chinook + or the GCMS Chinook Tab, please contact the TRV Journey Lab – Officer Team at the following email:

[IRCC.JL.Officer-JL.Officier.IRCC@cic.gc.ca](mailto:IRCC.JL.Officer-JL.Officier.IRCC@cic.gc.ca)

s.16(1)(b)

## New tools at a glance

The TRV Journey Lab has recently created new features in Chinook and GCMS to help improve the decision-maker experience while processing TR applications.

Several features have been built to create a link between Chinook and GCMS, which will now allow decision-makers to:

### 1. Automate Final Decision Administrative tasks:

Using the new tools, decision-makers can now automate tasks that were previously done manually such as:

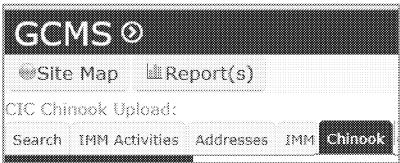
- Final Decision entry,
- Pasting notes from Chinook into Notes Tab
- Entry of refusal grounds
- Generation and sending of passport request/refusal letters
- Generating counterfoils
- Setting counterfoil print queue
- Modifying SP/WP Permit Details

2.

### 3. Automate Biometrics Administrative tasks:

Decision-makers can now indicate their Biometrics decision in Chinook, and the entry will be automated in GCMS

To take advantage of the new features, you will need access to two new tools:

Tool	Description
Chinook + 	<ul style="list-style-type: none"><li>▪ New version of Chinook that includes new functionality including:<ul style="list-style-type: none"><li>○ New Biometrics Action column</li><li>○ New functions in Action column</li><li>○ Export to GCMS button</li><li>○ Support for TRV/SP/WP/SP-EXTs</li></ul></li></ul>
GCMS - Chinook Tab 	<ul style="list-style-type: none"><li>▪ New Chinook Tab in GCMS that allows users to input data directly from Chinook then automates associated administrative tasks for final decisions and biometrics</li><li>▪ Support for SP/WP/SP-EXTs as of JUNE 2020 with GCMS Release 23</li><li>▪ Restricted Access: During the testing/rollout phase, the Chinook Tab will only be visible to users participating in the testing. Once full rollout is complete, the Chinook Tab will be added as a default for all GCMS Users with Visa Officer responsibility</li></ul>

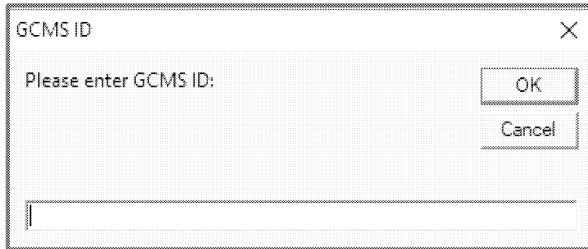
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## Set up and get started

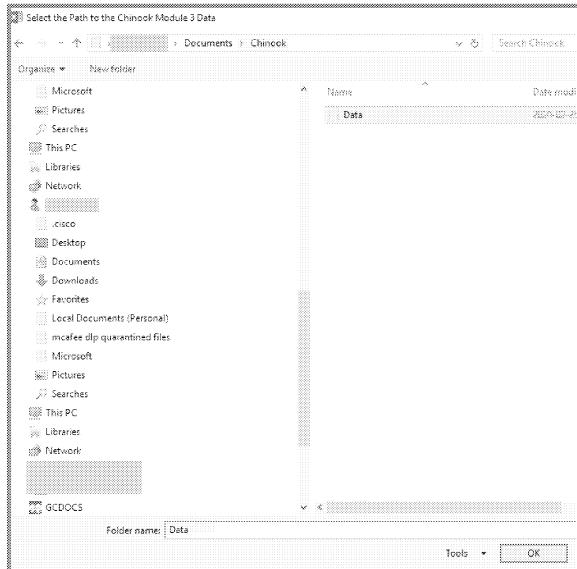
### Prepare Chinook +

1. Open *ChinookPlus – Module 3 – Viewer.xlsb*
2. Read the Disclosure dialogue box and click **OK**

3. **Enter your GCMS ID:** When prompted, enter your GCMS ID  
**NOTE:** you must enter a GCMS ID to use Chinook+ with the GCMS Chinook Tab).



4. **Set your data path:** If data path is not already set up, navigate to the *Chinook>Data* folder on your computer and click **OK**.



s.16(1)(c)

Prepare Chinook +  
(continued)

5. Ensure that the Data folder contains the following files:

- Mod 3
- Mod 5
- Schema
- REGION NAME – Mod 3 – Cols
- REGION NAME – Mod 3 – Hist
- (NEW) Chinook – Mod 3-Biometrics Ready
- (NEW) Chinook – Mod 3-Biometrics Roll Up

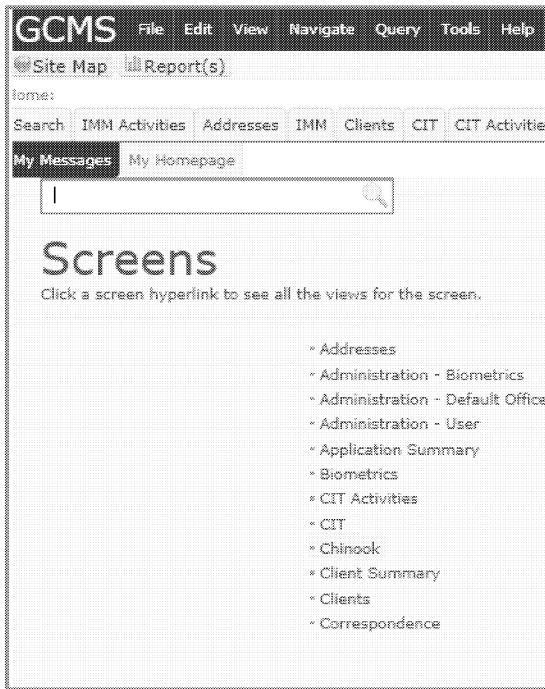
6. Set up your Selected Region and GCMS ID:

1. Click on the *Settings* button 
2. Under the User Info window:
  - Select the relevant *Region*

**NOTE:** The GCMS ID used in Chinook+ must match the GCMS ID of the user, when using the Chinook Tab in GCMS.

## Prepare Chinook Tab

7. Open a new session of GCMS
8. Click on the new *Chinook Tab*
9. If not visible in your tabs, navigate to *Site Map>Chinook* and select *Chinook*

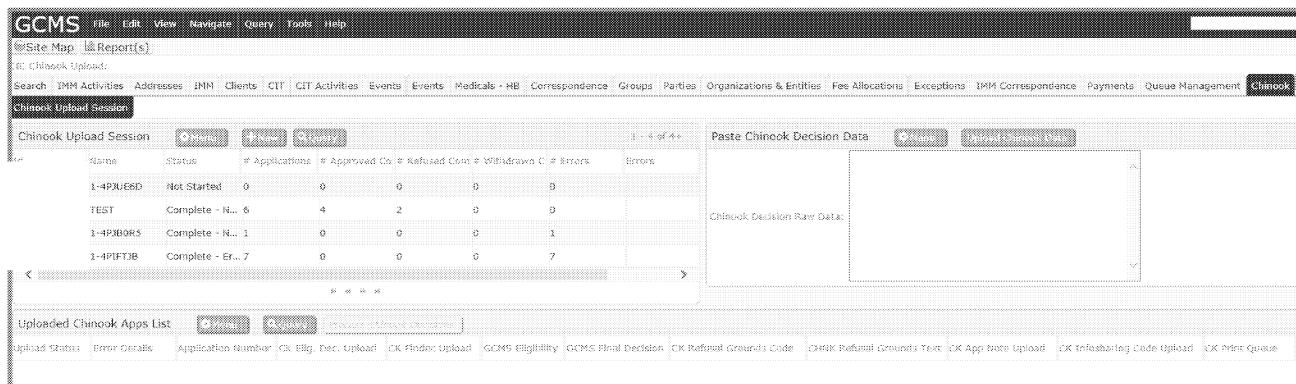


**Screens**  
Click a screen hyperlink to see all the views for the screen.

- » Addresses
- » Administration - Biometrics
- » Administration - Default Office
- » Administration - User
- » Application Summary
- » Biometrics
- » CIT Activities
- » CIT
- » Chinook
- » Client Summary
- » Clients
- » Correspondence

**NOTE:** The Chinook Tab is currently restricted only to officers involved in the testing. Once the new tools are fully tested and rolled out to all missions, the Chinook Tab will be available to all GCMS users with Visa Officer responsibility.

## Chinook Tab layout



Name	Status	# Applications	# Approved	# Refused	# Withdrawn	C# Errors	Errors
1-4PUEED	Not Started	0	0	0	0	0	0
TEST	Complete - N...	6	4	2	0	0	0
2-4PNBORS	Complete - N...	1	0	0	0	1	0
1-4PFTT3B	Complete - Br...	7	0	0	0	7	0

Paste Chinook Decision Data

Chinook Decision Rule Data:

## Chinook+ :: What's New

## Using the new Biometrics Action column

1. **Hover over feature:** Hover over any cell in the Biometric Action column to quickly view the biometrics details for an application, hover over the cell.
2. **To view the Biometrics Window for a single application:** Highlight the Biometrics Action cell corresponding to an application to launch the Biometrics Window.
3. **To view the Biometrics Window for a multiple applications:** In the Biometrics Action column, highlight multiple cells for the corresponding applications to launch the Biometrics Window

See [ANNEX A](#) for description and details of the Biometrics Action Column Statuses.

4. **Biometrics Window:** Use the << & >> buttons to toggle through your selected applications. The Application # and Record count will change as you toggle through the applications.

## Using the new Biometrics Action column (continued)

5. For applications where the *Biometric – FCC Detail* Activity for US, NZ or AUS is at status *Ready to be Assessed*, the appropriate check boxes will be activated.
  
6. **Reviewed:** Click on the appropriate checkbox to set the biometrics activity status to *Complete – Assessed*. Once you have checked any of the boxes in the Biometrics Window, the Biometrics Action column will subsequently display *Reviewed* for that application.
  
7. **Review Required:** If further review of the biometrics is required outside of Chinook, click the *Review Required* checkbox. The Biometrics Action column will subsequently display *Review Required* for that application.

## Using the new Biometrics Action column (continued)

8. When you have completed the biometrics assessments for the application(s), click the *Save Biometric Action* button to ensure that your assessments are saved and included in the Export to GCMS.

## Using the new features in the Action Window

### 9. Approvals: Counterfoil Details (For all LOBs)

If the Approval checkbox is selected in the Action Window, decision-makers will now be able to select the following details from the *Action Window*. **NOTE:** If any of these fields are not entered in Chinook, then existing GCMS defaults will be followed.

#### Counterfoil Print Queue:

- Select your Office from the *Office* dropdown menu
- Select your desired *Counterfoil Print Queue* from the second dropdown (which will show a list of Print Queues associated to the selected office).
- **NOTE:** If no Print Queue is selected, your GCMS default print queue will be used once you have entered information in the Chinook Tab.

#### Counterfoil Validity Date:

- Click on the *Date* button to launch the calendar window and select a date.

## Using the new features in the Action Window (continued)

### 10. Approvals: Permit Details (For SP, WP, SP-EXT and WP-EXT)

For SP, WP, SP-EXT and WP-EXT approvals, , additional fields will appear in the Action Window:

- **Permit Validity Date:**

Click on the *Date* button to launch the calendar window and select a date.

- **Remarks:**

Enter relevant remarks in the Remarks window as required.

## Using the new features in the Action Window (continued)

- **Conditions:**  
To select Permit Conditions – click on the *Approvals 2* tab in the Action Window and select the conditions that apply for the application. The conditions list will correspond to the selected Application Type.

### 11. Refusals:

- **Generate Refusal Letter Checkbox:**  
If the refusal checkbox is selected in the Action Window, the Generate Refusal Letter Checkbox will be checked as a default.

If a refusal decision is exported to GCMS using the Export to GCMS button, a refusal letter will automatically be generated in GCMS based on the exported refusal grounds.

Unchecking the box will stop the refusal letter from being automatically generated. This will allow additional edits or amendments to the refusal letter (i.e. adding comments for an “Other” refusal ground etc.

## Using the new features in the Action Window (continued)

### • Refusal Letter Intros:

For SP, WP, SP-EXT, WP-EXT, select the *Refusal Letter Intro* type from the drop-down box in the Action Window.

## Using the new Export to GCMS button

12. The new Export to GCMS button can be used in lieu of the Action List button. Once clicked, the button will copy instructions for GCMS onto your clipboard that can then be pasted directly into the GCMS Chinook Tab to perform the final decision administrative actions that typically would have been done manually. These actions are the following (**See Annex B & C for full details of actions completed in GCMS, including logic**):

- Final Decision entry
- Biometrics FCC Detail Assessments
- Pasting notes from Chinook into Notes Tab
- Entry of refusal grounds
- Generation and sending of passport request/refusal letters
- Generating counterfoils
- Setting Counterfoil Print Queue
- Setting Counterfoil Validity Date
- Setting Permit Validity Date (SP/WP/SP-EXT/WP-EXT only)
- Setting Conditions & Remarks (SP/WP/SP-EXT/WP-EXT only)

## Using the new Export to GCMS button (continued)

**NOTE:** All actions that are automated in GCMS, will be tagged in GCMS against the user's GCMS ID.

13. To use new Export to GCMS: Once decisions have been entered in the Action column, click on the Export to GCMS button.

**NOTE:** Applications that have "Other" in the Action column OR Applications that have already been Sent to GCMS will not be exported for decision.

14. The following window will pop up to confirm that the Export has been copied to your clipboard.



15. Navigate directly to the GCMS Chinook Tab to paste the information into GCMS. (see Chinook Tab instructions below).

**Sent to GCMS**

16. Once an application's information has been Exported to GCMS, a checkmark will appear in the "Sent To GCMS" column.

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## GCMS Chinook Tab :: It's All New



The screenshot shows the GCMS Chinook Tab interface with three main sections:

- Chinook Upload Session:** A table showing Chinook Session details. One session is listed with ID 1, Name "Not Started", Status "Not Started", Applications 0, Approved 0, Referred 0, Withdrawn 0, Errors 0.
- Paste Chinook Decision Data:** A large text area labeled "Chinook Checklist Raw Data" containing the number "2".
- Uploaded Chinook Apps List:** A table showing uploaded applications. One application is listed with ID 3, Name "Complete - N... 6", Status "Complete", Applications 0, Errors 0.

### Basics

#### Quick basics about the Chinook Tab:

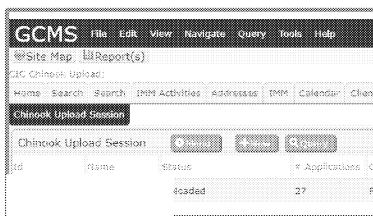
- Decisions entered in the Chinook Tab, will never overwrite existing decisions in Chinook (including Eligibility and Findecs)
- Any application processed in the Chinook tab will always be tagged to the Chinook Session ID – so it can be queried at a future time.
- All Chinook Tab data will be available via Answers Queries Errors that typically prevent applications from being finalized (i.e. Cost Recovery fee outstanding, Biometrics not assessed, open Criminality/Security assessments or Verifications etc) will continue to be returned in the Chinook Tab.

#### There are three sections to the new Chinook Tab:

- Chinook Upload Session**
  - To Create new Chinook Upload Session (much like creating a group)
- Paste Chinook Decision Data**
  - Paste data here after clicking “Export to GCMS” button in Chinook
- Uploaded Chinook Apps List**
  - Review uploaded Chinook Application information

### Creating a new Chinook Session

- Before pasting information from the Export to GCMS Chinook button, a new Chinook Session must be created.
- In the Chinook Upload Session window, click *New* button



ID	Name	Status	Applications
1	loaded	Not Started	27

- Session ID:** A new Chinook Session ID # will appear in the ID column
- Name:** The Session name can be edited in the name column. The name will default to the Session ID if not modified by the user

# Pasting Chinook Data into Chinook Tab

- In the *Paste Chinook Decision Data* section of the tab, paste (CTRL+V) your data from the *Export to GCMS* button in Chinook.

Paste Chinook Decision Data

Chinook Application Number	<input type="text"/>
Chinook Eligibility Assessment	<input type="text"/>
Chinook Final Decision	<input type="checkbox"/> 01 <input type="checkbox"/> 02 <input type="checkbox"/> 03 <input type="checkbox"/> 04 <input type="checkbox"/> 05 <input type="checkbox"/> 06 <input type="checkbox"/> 07 <input type="checkbox"/> 08 <input type="checkbox"/> 09 <input type="checkbox"/> 10 <input type="checkbox"/> 11 <input type="checkbox"/> 12 <input type="checkbox"/> 13 <input type="checkbox"/> 14 <input type="checkbox"/> 15 <input type="checkbox"/> 16 <input type="checkbox"/> 17 <input type="checkbox"/> 18 <input type="checkbox"/> 19 <input type="checkbox"/> 20 <input type="checkbox"/> 21 <input type="checkbox"/> 22 <input type="checkbox"/> 23 <input type="checkbox"/> 24 <input type="checkbox"/> 25 <input type="checkbox"/> 26 <input type="checkbox"/> 27 <input type="checkbox"/> 28 <input type="checkbox"/> 29 <input type="checkbox"/> 30 <input type="checkbox"/> 31 <input type="checkbox"/> 32 <input type="checkbox"/> 33 <input type="checkbox"/> 34 <input type="checkbox"/> 35 <input type="checkbox"/> 36 <input type="checkbox"/> 37 <input type="checkbox"/> 38 <input type="checkbox"/> 39 <input type="checkbox"/> 40 <input type="checkbox"/> 41 <input type="checkbox"/> 42 <input type="checkbox"/> 43 <input type="checkbox"/> 44 <input type="checkbox"/> 45 <input type="checkbox"/> 46 <input type="checkbox"/> 47 <input type="checkbox"/> 48 <input type="checkbox"/> 49 <input type="checkbox"/> 50 <input type="checkbox"/> 51 <input type="checkbox"/> 52 <input type="checkbox"/> 53 <input type="checkbox"/> 54 <input type="checkbox"/> 55 <input type="checkbox"/> 56 <input type="checkbox"/> 57 <input type="checkbox"/> 58 <input type="checkbox"/> 59 <input type="checkbox"/> 60 <input type="checkbox"/> 61 <input type="checkbox"/> 62 <input type="checkbox"/> 63 <input type="checkbox"/> 64 <input type="checkbox"/> 65 <input type="checkbox"/> 66 <input type="checkbox"/> 67 <input type="checkbox"/> 68 <input type="checkbox"/> 69 <input type="checkbox"/> 70 <input type="checkbox"/> 71 <input type="checkbox"/> 72 <input type="checkbox"/> 73 <input type="checkbox"/> 74 <input type="checkbox"/> 75 <input type="checkbox"/> 76 <input type="checkbox"/> 77 <input type="checkbox"/> 78 <input type="checkbox"/> 79 <input type="checkbox"/> 80 <input type="checkbox"/> 81 <input type="checkbox"/> 82 <input type="checkbox"/> 83 <input type="checkbox"/> 84 <input type="checkbox"/> 85 <input type="checkbox"/> 86 <input type="checkbox"/> 87 <input type="checkbox"/> 88 <input type="checkbox"/> 89 <input type="checkbox"/> 90 <input type="checkbox"/> 91 <input type="checkbox"/> 92 <input type="checkbox"/> 93 <input type="checkbox"/> 94 <input type="checkbox"/> 95 <input type="checkbox"/> 96 <input type="checkbox"/> 97 <input type="checkbox"/> 98 <input type="checkbox"/> 99 <input type="checkbox"/> 100
Chinook Decision By	<input type="text"/>
Chinook Generate Documents	<input type="button" value="Generate"/>

Chinook Decision Raw Data:

```
[{ "id": 1, "name": "John Doe", "age": 30, "status": "Eligible", "decision": "Approved", "notes": "Approved for 100% funding." }, { "id": 2, "name": "Jane Smith", "age": 25, "status": "Eligible", "decision": "Approved", "notes": "Approved for 100% funding." }, { "id": 3, "name": "Mike Johnson", "age": 45, "status": "Eligible", "decision": "Approved", "notes": "Approved for 100% funding." }, { "id": 4, "name": "Sarah Lee", "age": 35, "status": "Eligible", "decision": "Approved", "notes": "Approved for 100% funding." }, { "id": 5, "name": "David Wilson", "age": 50, "status": "Eligible", "decision": "Approved", "notes": "Approved for 100% funding." }, { "id": 6, "name": "Emily Davis", "age": 28, "status": "Eligible", "decision": "Approved", "notes": "Approved for 100% funding." }, { "id": 7, "name": "Aaron Green", "age": 32, "status": "Eligible", "decision": "Approved", "notes": "Approved for 100% funding." }, { "id": 8, "name": "Brianna Blue", "age": 22, "status": "Eligible", "decision": "Approved", "notes": "Approved for 100% funding." }, { "id": 9, "name": "Caleb Brown", "age": 40, "status": "Eligible", "decision": "Approved", "notes": "Approved for 100% funding." }, { "id": 10, "name": "Diana White", "age": 38, "status": "Eligible", "decision": "Approved", "notes": "Approved for 100% funding." }, { "id": 11, "name": "Elijah Black", "age": 33, "status": "Eligible", "decision": "Approved", "notes": "Approved for 100% funding." }, { "id": 12, "name": "Fiona Grey", "age": 27, "status": "Eligible", "decision": "Approved", "notes": "Approved for 100% funding." }, { "id": 13, "name": "Gabe Red", "age": 37, "status": "Eligible", "decision": "Approved", "notes": "Approved for 100% funding." }, { "id": 14, "name": "Hannah Purple", "age": 29, "status": "Eligible", "decision": "Approved", "notes": "Approved for 100% funding." }, { "id": 15, "name": "Ivan Orange", "age": 31, "status": "Eligible", "decision": "Approved", "notes": "Approved for 100% funding." }, { "id": 16, "name": "Jasmine Yellow", "age": 26, "status": "Eligible", "decision": "Approved", "notes": "Approved for 100% funding." }, { "id": 17, "name": "Kaius Teal", "age": 36, "status": "Eligible", "decision": "Approved", "notes": "Approved for 100% funding." }, { "id": 18, "name": "Liam Indigo", "age": 24, "status": "Eligible", "decision": "Approved", "notes": "Approved for 100% funding." }, { "id": 19, "name": "Mia Saffron", "age": 34, "status": "Eligible", "decision": "Approved", "notes": "Approved for 100% funding." }, { "id": 20, "name": "Nathan Vermilion", "age": 21, "status": "Eligible", "decision": "Approved", "notes": "Approved for 100% funding." }, { "id": 21, "name": "Oscar Marigold", "age": 39, "status": "Eligible", "decision": "Approved", "notes": "Approved for 100% funding." }, { "id": 22, "name": "Peyton Turquoise", "age": 23, "status": "Eligible", "decision": "Approved", "notes": "Approved for 100% funding." }, { "id": 23, "name": "Quinn Amethyst", "age": 32, "status": "Eligible", "decision": "Approved", "notes": "Approved for 100% funding." }, { "id": 24, "name": "Riley Garnet", "age": 20, "status": "Eligible", "decision": "Approved", "notes": "Approved for 100% funding." }, { "id": 25, "name": "Savannah Citrine", "age": 38, "status": "Eligible", "decision": "Approved", "notes": "Approved for 100% funding." }, { "id": 26, "name": "Tanner Jasper", "age": 28, "status": "Eligible", "decision": "Approved", "notes": "Approved for 100% funding." }, { "id": 27, "name": "Ulysses Lapis Lazuli", "age": 35, "status": "Eligible", "decision": "Approved", "notes": "Approved for 100% funding." }, { "id": 28, "name": "Vivian Opal", "age": 22, "status": "Eligible", "decision": "Approved", "notes": "Approved for 100% funding." }, { "id": 29, "name": "Wade Pearl", "age": 33, "status": "Eligible", "decision": "Approved", "notes": "Approved for 100% funding." }, { "id": 30, "name": "Xavier Quartz", "age": 25, "status": "Eligible", "decision": "Approved", "notes": "Approved for 100% funding." }, { "id": 31, "name": "Yara Coral", "age": 37, "status": "Eligible", "decision": "Approved", "notes": "Approved for 100% funding." }, { "id": 32, "name": "Zane Topaz", "age": 27, "status": "Eligible", "decision": "Approved", "notes": "Approved for 100% funding." }]
```

**NOTE:** A "\$" sign will appear at the end of the pasted Chinook information. This indicates the end of the information. Do not hit enter, or enter any other characters after this \$ - it will cause an error.

6. Click the *Upload Chinook Data* button to review your application information.

**NOTE:** This will not process the decisions, it will pull the Chinook decision information into the Uploaded Chinook Data list for review.

## Review Uploaded Chinook Apps List

7. The application information entered in Chinook will appear in the Uploaded Chinook Data window:

Uploaded Chinook Apps List							
Upload Status	Error Details	Application Number		CK Elig., Dec., Upload	CK Findic Upload	QCMIS Eligibility	QCMIS Final Decision
Not Started				Passed	Approved		

8. The following information can be reviewed in the relevant columns:

## Upload Chinook Apps List Columns:

Uploaded Chinook Apps List        

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## Using the Process Chinook Data button

- Once applications have been reviewed – click the *Process Chinook Decisions* to complete the final decision activities for the applications.



Upload Status	Error Details	Application Number	CK Sig. Dec. Upload	CK Finder Upload	GCMS Eligibility	GCMS Final Decision
Not Started				Passed		Approved

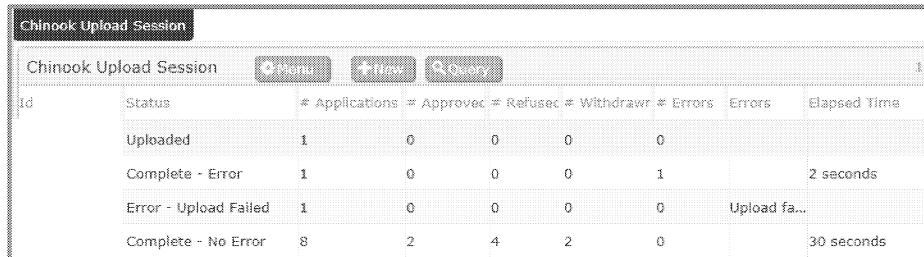
**NOTE:** Depending on the number of applications being processed, the delay may be several minutes. **The buffer wheel will only appear for 90seconds and then will disappear. This does not mean that the processing has crashed.** Status will change to Complete or Complete- Error once processing is done.

### SUGGESTIONS:

- Do not process more than 25 applications at a time.
- Continue review of remaining applications in Chinook while you wait for the Chinook Tab to finish processing.

## Upload Statuses & Summaries

The Chinook Upload Session status will indicate the processing status of the group of applications in that session.



Chinook Upload Session								
Id	Status	# Applications	# Approved	# Refused	# Withdrawn	# Errors	Errors	Elapsed Time
	Uploaded	1	0	0	0	0		
	Complete - Error	1	0	0	0	1		2 seconds
	Error - Upload Failed	1	0	0	0	0	Upload fa...	
	Complete - No Error	8	2	4	2	0		30 seconds

The Chinook Upload Session window also provides a summary of the # Apps, # Approved, # Withdrawn, # Refused, # Errors as well as the elapsed time for each complete session.

## Application Error Statuses

As mentioned above, errors typically returned to a user to indicate that the application cannot be finalized, will still appear in the Chinook Tab under Application Error Status.

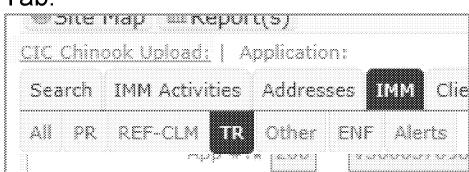
There are several new errors listed below that are specific to the Chinook Tab:

## Fixing Application Errors

10. Should an error occur on an application, click on the Application Number hyperlink.

Upload Status	Error Details	Application Number	DK (Bq. Dec. Upload)
Error	Biometrics Assessment is required.	<a href="#">I-8PI1V30</a>	
Error	Biometrics Assessment is required.	<a href="#">I-8PI1V4U</a>	
Error	Final Decision already exists in application		
Error	Final Decision already exists in application		
Error	Final Decision already exists in application		
Error	Final Decision already exists in application		
Error	Final Decision already exists in application		
Error	Final Decision already exists in application		

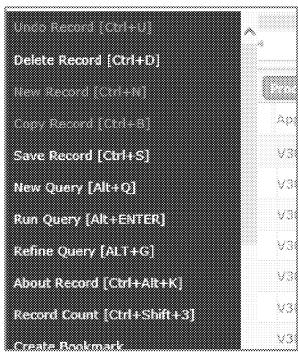
11. Fix the error, if possible and use the breadcrumb to return to the Chinook Session Tab.



## Deleting Applications from a Session

12. Click the Process Chinook Decisions button, and all applications that are not at Status= Complete will be re-processed.

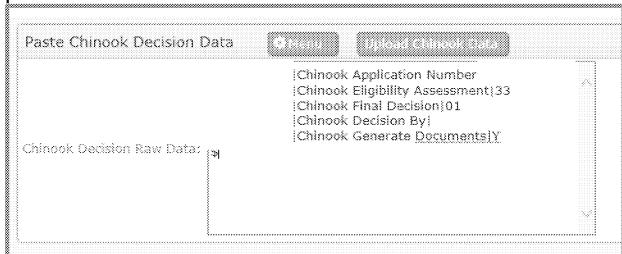
13. To delete an application from a Session, highlight the application(s) and click *Menu>Delete Record*.



## Troubleshooting

The Chinook+ and Chinook Tab are new and there may be bugs that have not been identified..

There are a few known issues that are identified below to assist with troubleshooting:

Issue	Workaround
<b>The buffer wheel disappears</b> and it looks like the Chinook session has crashed.	In GCMS, the buffer wheel automatically disappears after 60-90second. Unfortunately, this isn't something we could easily fix.
OR Chrome gives me this Page Unresponsive message: 	<p><b>So trust it and let it run</b> – the Session Status will change to Complete – No Error or Complete – Error once it's done.</p> <p>Do not click the Process button again as this will actually make it crash.</p>
<b>When I paste my information from Chinook into the Chinook Raw Data window, I see a \$ and then some other symbols:</b>  Ex: V1 Chinook Application Number V1 V1 Chinook Eligibility Assessment 33 V1 Chinook Final Decision 01 V1 Chinook Decision By  V1 Chinook Generate Documents Y \$ >p	To avoid errors in the Chinook Tab, ensure that there are no extra characters or spaces after you paste in the Chinook Data window:  

Delete all extra characters and spaces after the \$.

# ANNEX A

## Biometric Action Column

Biometric Action Column Display   Biometrics Details Column: Lead Tag Line   Logic

---

**POT ERROR – SEE GCMS**      Potential Info Sharing Error – see GCMS

---

**ERROR Q1 – SEE GCMS**      Info Sharing Q1 Failure – see GCMS

---

**ERROR Q2 – SEE GCMS**      Info Sharing Q2 Failure – see GCMS

---

**NOT ASSOCIATED  
OR  
ALL NOT ASSOCIATED**      Biometrics Not Associated - see GCMS

---

**POT ADV - SEE GCMS**      Potentially Adverse Info – see GCMS

**NOTE:** The detailed information for this record will not be provided in Chinook. Decision-Maker will be required to review information in GCMS and the Biometrics Assessment checkboxes for this application will be disabled in Chinook.

USA pending	Additional Info – see GCMS
NZL Pending	
AUS pending	
USA/NZL/AUS pending	
USA/NZL pending	
USA/AUS pending	
NZL/AUS pending	

COMPLETE (COUNTRY)	COMPLETE
OR	
ALL COMPLETE	

(COUNTRY) NRT	ALL NRT
OR	
ALL NRT	

EXEMPT (COUNTRY)	ALL EXEMPT
OR	
ALL EXEMPT	

INCOMPLETE FINGERPRINT (COUNTRY)	INCOMPLETE
OR	
INCOMPLETE NOT STARTED	
OR	
ALL INCOMPLETE	

## BIOMETRIC STATUSES THAT WILL APPEAR AFTER DECISION-MAKER REVIEW

REVIEWED	If the user has reviewed Biometrics and clicked on an assessment check box and "Save Biometrics Action" button
REVIEW REQUIRED	User has checked the "Review Required" box in the Biometrics Action Column

## EX B

### ecision Logic - TRV

		Final Decision		
Activity/Field in GCMS		Approval	Refusal	Withdrawal
& Findec	Eligibility Assessment	Eligibility: Passed	Eligibility: Failed	Eligibility: (blank – unless Passed or Failed)
	Final Assessment	Final Decision : Approved	Final Decision : Refused	Final Decision : Withdrawn
	Notes tab	Yes	Yes	Yes
ounds:	Finalize Application>Refusal Grounds	N/A	Yes	N/A
	Correspondence: Correspondence>Outgoing	Ppt Request Itr = Generate	Refusal Letter = Generate	No letter generated – can letters that have to be placed in T:Drive
		Ppt Request Itr = Sent	Refusal Letter = Sent	
il	Finalize Application> Document Issuance	Ppt Request Itr = Generate	Refusal Letter = Generate	
		Generate and set Print Queue	N/A	N/A
		If Received Via Other/VAC = set letter to Sent	If Received Via Other/VAC = set letter to Sent	Send withdrawal letter
GCMS won't let us automate that you'll still have to do :		Set Validity Date if change is required		

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## Decision Logic - SP

		Final Decision		
Activity/Field in GCMS		Approval	Refusal	Withdrawal
Eligibility Assessment		Eligibility: Passed	Eligibility: Failed	Eligibility: (blank – unless Passed or Failed)
Final Assessment		Final Decision : Approved	Final Decision : Refused	Final Decision : Withdrawn
Notes tab		Yes	Yes	Yes
Finalize Application>Refusal Grounds		N/A	Yes	N/A
Correspondence>Outgoing		POE Intro Ltr = Generate Study Permit = Authorized	Refusal Letter = Generate	No letter generated – can letters that have to be printed on T:Drive
		POE Intro Ltr = Generate Study Permit = Authorized Original Ppt Request = Sent	Refusal Letter = Sent	
		POE Intro Ltr = Generate Study Permit = Authorized Original Ppt Request = Generate	Refusal Letter = Generate	
Finalize Application> Document Issuance		Generate and set Print Queue Set Validity Date Counterfoil = Generate eTA = Authorized	N/A	N/A
Finalize Application >Document Issuance>Type = Permit – SP		Set Validity Date		
won't let us automate that you'll still have to do :		User Remarks based on Chinook entry Conditions based on Chinook entry		
		If Received Via Other/VAC = set letter to Sent	If Received Via Other/VAC = set letter to Sent	Send withdrawal letter

## Decision Logic - SP-EXT

		Final Decision		
Activity/Field in GCMS		Approval	Refusal	Withdrawal
Indec Final Assessment	Eligibility Assessment	Eligibility: Passed	Eligibility: Failed	Eligibility: (blank – unless Passed or Failed)
	Notes tab	Final Decision : Approved	Final Decision : Refused	Final Decision : Withdrawal
	Finalize Application>Refusal Grounds Refusal Letter Details>Paragraph Type	Yes	Yes	Yes
Nds: Correspondence	Correspondence>Outgoing	N/A	Yes	N/A
	Finalize Application> Document Issuance	Refusal Letters Details> Paragraph Type based on Chinook entry		No letter generated – can letters that have to be printed on T:Drive
	Finalize Application >Document Issuance>Type = Permit – SP	Study Permit = Generate  Study Permit = Generate	Refusal Letter = Sent  Refusal Letter = Sent	
won't let us automate that you'll still have to do :		Generate and set Print Queue  Set Validity Date  Counterfoil = Generate  eTA = Authorized  Set Validity Date	N/A	N/A
		User Remarks based on Chinook entry  Conditions based on Chinook entry		
		Set Study Permit to Authorized	N/A	Send withdrawal letter

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## ecision Logic - WP

		Final Decision		
	Activity/Field in GCMS	Approval	Refusal	Withdrawal
ndec	Eligibility Assessment	Eligibility: Passed	Eligibility: Failed	Eligibility: (blank – unless Passed or Failed)
	Final Assessment	Final Decision : Approved	Final Decision : Refused	Final Decision : Withdrawn
	Notes tab	Yes	Yes	Yes
nds:	Finalize Application>Refusal Grounds	N/A	Yes	N/A
	Refusal Letter Details>Paragraph Type	Refusal Letters Details> Paragraph Type based on Chinook entry		
nce:	Correspondence>Outgoing	POE Introduction Ltr = Generate Work Permit = Authorized	Refusal Letter = Generate	No letter generated – can automate letters that have been picked from the T:Drive
		POE Introduction Ltr = Generate Work Permit = Authorized Original Passport Request = Sent	Refusal Letter = Sent	
		POE Introduction Ltr = Generate Work Permit = Authorized Original Passport Request = Generate	Refusal Letter = Generate	
	Finalize Application> Document Issuance	Generate and set Print Queue  Set Validity Date  Counterfoil = Generate  eTA = Authorized	N/A	N/A
	Finalize Application >Document Issuance>Type = Permit – WP	Set Validity Date  User Remarks based on Chinook entry  Conditions based on Chinook entry	N/A	N/A

won't let us automate that you'll still have to do :

If Received Via Other/VAC = set letter to Sent

If Received Via Other/VAC = set letter to Sent

Send withdrawal letter

## Decision Logic - WP-EXT

		Final Decision		
Activity/Field in GCMS		Approval	Refusal	Withdrawal
Eligibility Assessment		Eligibility: Passed	Eligibility: Failed	Eligibility: (blank – unless Passed or Failed)
Final Assessment		Final Decision : Approved	Final Decision : Refused	Final Decision : Withdrawn
Notes tab		Yes	Yes	Yes
Finalize Application>Refusal Grounds		N/A	Yes	N/A
Refusal Letter Details>Paragraph Type			Refusal Letters Details> Paragraph Type based on Chinook entry	
Correspondence>Outgoing		Work Permit = Generate  Work Permit = Generate	Refusal Letter = Generate  Refusal Letter = Sent	No letter generated – can automate letters that have been picked from the T:Drive
Finalize Application> Document Issuance		Generate and set Print Queue  Set Validity Date  Counterfoil = Generate  eTA = Authorized	N/A	N/A
Finalize Application >Document Issuance>Type = Permit – WP-EXT		Set Validity Date  User Remarks based on Chinook entry  Conditions based on Chinook entry	N/A	N/A
won't let us automate that you'll still have to do :		If Received Via Other/VAC = set letter to Sent	If Received Via Other/VAC = set letter to Sent	Send withdrawal letter



# ANNEX C

## Eligibility Logic

Decision-Maker Entry in Chinook		What happens in GCMS			
If Chinook Final Decision =	THEN Chinook Eligibility will be set to:	If Existing GCMS Eligibility =	THEN Chinook Tab will set GCMS Eligibility to:	THEN Error Message =	
Approved	Passed	Blank	Passed	n/a	
		In Progress	Passed	n/a	
		Not Started	Passed	n/a	
		Recommend Interview	Passed	n/a	
		Recommend Passed	Passed	n/a	
		Review Required	Passed	n/a	
		Passed	Will not overwrite existing Eligibility decision, but will continue with remaining Final Decision actions	n/a	
		Not Met	No actions will be completed. Will return Error to Officer.	"Eligibility is Not Met"	
		Failed	No actions will be completed. Will return Error to Officer	"Application's Final Assessment cannot be updated due to Eligibility Assessment value"	
		Blank	Failed	n/a	
Refused	Failed	In Progress	Failed	n/a	
		Not Started	Failed	n/a	
		Recommend Interview	Failed	n/a	
		Recommend Passed	Failed	n/a	
		Review Required	Failed	n/a	
		Passed	No actions will be completed. Will return Error to Officer	"Application's Final Assessment cannot be updated due to Eligibility Assessment value"	
		Not Met	Failed		
		Failed	Will not overwrite existing Eligibility decision, but will continue with remaining Final Decision actions		
		Blank	Blank		
		In Progress	Blank		
Withdrawal	Blank	Not Started	Blank		
		Recommend Interview	Blank		
		Recommend Passed	Blank		
		Review Required	Blank		
		Passed	Will not overwrite existing Eligibility decision, but will continue with remaining Final Decision actions		
		Not Met	No actions will be completed. Will return Error to Officer.	"Eligibility is Not Met"	
		Failed	No actions will be completed. Will return Error to Officer.	"Eligibility is Failed"	
		Blank	Blank		
		In Progress	Blank		